CHURNZERO

Customer journeys workbook

Build exceptional experiences at every stage of the customer lifecycle

What are customer journeys?

Journeys are a way to build exceptional experiences for your customers at every lifecycle stage. You can use journeys to configure tasks for any group of customers, track their progress, and keep them engaged. When combined with segmentation, automation, AI, and in-app communication tools, journeys can improve adoption and customer satisfaction while significantly reducing your workload. You can also create multiple journeys for each customer or customer base.

This short workbook will help you define the fundamentals needed to build effective customer journeys that keep your customers engaged and processes moving forward.

What do you need to create an exceptional journey?

A goal

Always start with the end game in mind. What is the overall goal of this lifecycle stage? What is the desired outcome for customers? It sounds simple, but this critical step will ensure you are aligning the steps in the journey to get the customer to the final goals.

Customer segments

Segmenting your customer base ensures you can deliver tailored support for each of your customer groups. Establishing who the journey is built for is equally as important as defining the goal of the journey.

Entry conditions

Now that you have defined a goal and the customer segment you are targeting, you need to determine when these customers should begin this journey. Did sales just close a deal? Is it a change in the customer's ChurnScore? Did they just upgrade to a new product edition? You can kick off your journey manually or automatically using data in ChurnZero!

Exit conditions

You can end journeys manually or automatically once milestones are complete or when accounts meet predetermined criteria.

Failure conditions

Determine and configure the conditions for "failure" within the journey lifecycle. These can be triggered manually or automatically.

Journey length

Establish how many days it should take a customer to complete the entire journey. Not sure what an ideal timeframe should be? Start by outlining how many days each journey task and achievement should take and add them up for a total journey duration.

Progress parameters

Once you have determined your journey's ideal length, use the journey's progress parameters to easily visualize and report on customers who are on track, behind, or stuck based on your ideal timeframe.

Journey components

- **Milestones**

  Milestones are the distinct phases that make up the overall journey, as in a "requirements gathering" phase during customer onboarding. Ask yourself: what are the key phases of your journey and how long will each take?

- **Achievements**

  Achievements are the deliverables that your customer is responsible for in each milestone, such as "Log in for the first time" or "Complete integration worksheet." Ask yourself: what does your customer need to do to move through each milestone?

- **Tasks**

  Tasks are action items that your internal teams must complete in each milestone, such as "Complete customer welcome call" or "Share usage report with customer." Ask yourself: what deliverables are your internal teams responsible for to ensure your customer moves through each milestone?

When you put all these pieces together, you get a comprehensive customer journey! To show you what this looks like, we've put together a sample template of a journey example.

Journey details					
Journey name	New customer onboarding				
Journey goal	Tracks customers from contract signature through technical implementation to make sure it's a smooth transition. At completion, the customer should be fully configured, trained, & set up for a successful adoption.				
Journey customers	New accounts that are being transitioned from the sales team to the CS team. They should have a signed contract and an identified start date.				
Journey length (in days)	45 days				
Progress parameters	On time	45 days	Behind	46–60 days	Stuck	61+ days
Entry conditions					
Account has signed contract					
Account has a start date					
Account is assigned a CSM					
Complete conditions					
When all milestones are completed					
Failure conditions					
Manually set failure when applicable					
Potential reasons for failure					
Lost main point of contact/champion					
Customer did not commit					
Budget/money reasons					

Milestones

Milestone #1						
Name	Sales handoff					
Description	When sales hands off an account, CS team will welcome new account					
Begin	When journey begins					
Length (in days)	7 days					
Progress parameters	On time	7 days	Behind	8-9 days	Stuck	10+ days
Achievements						
Achievement #1	Login & setup account					
Tasks					**Owner**	
Task #1	Review customer contract & sales notes				CSM	
Task #2	Internal meeting between Sales & CS				CSM	
Task #3	Send welcome email to customer				CSM	
Task #4	Host welcome call & review implementation worksheet				CSM	

Milestone #2					
Name	Account configuration				
Description	The CSM & implementation specialist will guide the customer through integration and account setup				
Begin	When milestone #1 completes				
Length (in days)	21 days				
Progress parameters	On time	21 days	Behind	22–25 days	Stuck	26+ days

Achievements	
Achievement #1	Complete implementation worksheet & send to CSM
Achievement #2	Authorize & complete API integrations
Achievement #3	Customer sign-off on data

Tasks		Owner
Task #1	Review completed implementation worksheet with implementation specialist internally	CSM
Task #2	Enable necessary APIs & prep for data import	Implementation specialist
Task #3	Quality check data once integrations are authorized	Implementation specialist
Task #4	Schedule data review call with implementation specialist & customer	CSM
Task #5	Complete data review call	Implementation specialist

Milestone #3					
Name	Training & go-live				
Description	Now that the customer's account setup is complete, the CSM will train & prepare the customer for go-live				
Begin	When milestone #2 completes				
Length (in days)	15 days				
Progress parameters	On time	15 days	Behind	16-19 days	Stuck	20+ days

Achievements	
Achievement #1	Complete all admin training courses
Achievement #2	User accounts created for team members

Tasks		Owner
Task #1	Host training prep sessions with admins	CSM
Task #2	Create PPT for team training sessions	CSM
Task #3	Host team training session #1	CSM
Task #4	Host team training session #2	CSM
Task #5	Send post-training email with follow-up resources	CSM
Task #5	Send go-live email & schedule monthly check-in calls	CSM

ChurnZero tips

Avoid setting unrealistic journey lengths and progress parameters. Journeys that inaccurately show every account as "behind" or "stuck" can confuse account teams and skew reporting.

If your journey has deliverables that only apply to certain accounts in your chosen segment, add conditional criteria to the step to ensure the task or achievement doesn't get created for accounts that it doesn't apply to.

No one likes extra admin work. Review your journey's deliverables to ensure they are not repetitive and combine them whenever possible to streamline the journey.
Example: Combine your "Review sales notes" and "Catch up with sales," tasks into a single task.

Your journey and milestone timelines may not be perfect the first time you set up a journey; that is completely normal. Review your journey reports regularly to identify roadblocks and customer progress trends.

Now it's your team's turn to think about the different journeys they can create to give your customers the most effective and valuable experience with your product.

Journey template

Journey details						
Journey name						
Journey goal						
Journey customers						
Journey length (in days)						
Progress parameters	On time		Behind		Stuck	
Entry conditions						
Complete conditions						
Failure conditions						
Potential reasons for failure						

Milestone #1						
Name						
Description						
Begin						
Length (in days)						
Progress parameters	On time		Behind		Stuck	

Achievements	
Achievement #1	
Achievement #2	
Achievement #3	

Tasks		Owner
Task #1		
Task #2		
Task #3		
Task #4		
Task #5		

Milestone #2						
Name						
Description						
Begin						
Length (in days)						
Progress parameters	On time		Behind		Stuck	

Achievements	
Achievement #1	
Achievement #2	
Achievement #3	

Tasks		Owner
Task #1		
Task #2		
Task #3		
Task #4		
Task #5		

Milestone #3						
Name						
Description						
Begin						
Length (in days)						
Progress parameters	On time		Behind		Stuck	

Achievements	
Achievement #1	
Achievement #2	
Achievement #3	

Tasks		Owner
Task #1		
Task #2		
Task #3		
Task #4		
Task #5		

Milestone #4						
Name						
Description						
Begin						
Length (in days)						
Progress parameters	On time		Behind		Stuck	

Achievements	
Achievement #1	
Achievement #2	
Achievement #3	

Tasks	Owner
Task #1	
Task #2	
Task #3	
Task #4	
Task #5	

Milestone #5						
Name						
Description						
Begin						
Length (in days)						
Progress parameters	On time		Behind		Stuck	
Achievements						
Achievement #1						
Achievement #2						
Achievement #3						

Tasks	Owner
Task #1	
Task #2	
Task #3	
Task #4	
Task #5	

Learn more. Schedule a demo today.

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